

# Tips

## Excel: Customizing Reports in Excel

1. If you would like to reduce the amount of Excel editing you have to do considering using the SourceYourMeeting.com Guest User functionality. This allows your customer to customize their own report and see the online grid for just the projects/meetings you share with them.
  2. Create Macros when you have repeat actions. You know what they say about doing the same thing over and over again.
  3. Once you create a template do Save As so you don't overwrite it by mistake. (SavesAs Template (.xlmt))
  4. Copy a Tab of data to another tab before manipulating the data so you have a starting point to go back to.
  5. Hide columns you don't wish to display, (avoid Delete whenever possible) (Lynda.com has a great tutorial on using the Protect Workbook as well, to protect hidden columns from other users.
  6. Widen columns by the width of the data (Careful not to expand all to the number of characters because comments fields have 1000+ characters)
    1. Double click on the vertical divider line between a columns (or multiple selected columns)
    2. Another function that is helpful is to "Wrap Text" in cells that have Comments
    3. Format (Horizontal Alignment)
  7. Sort and Filter: Here you will want to set your order or filter data
    1. Filters on a single Row or Multiple Rows using "Filter" on the Data Tab in Excel
  8. Preparing to Distribute or Show
    1. Page Setup (Preview / Page view / Gridlines / Row and Column Headings) this is where you will want to:
      1. Change the orientation to Landscape
      2. Adjust the Scaling to fit more on a page
- Add a customer header and footer for Page 1, Logo, Phone Number, etc)
1. On Sheet Tab click "Gridlines", "Row and column headings"
  2. Print Titles (Page Layout Tab) allows you to select a row or columns you'd like to show on every page on reports that will print on multiple pages.
1. Adjust formats of data with Format Painter

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